



United States Department of State

Bureau of Human Resources
Office of Retirement
Room H-620, SA-1
Washington, D.C. 20522

Disposition of Retirement Contributions Checklist

I elect the following disposition of my contributions in the Foreign Service Retirement & Disability System (FSRDS)/Foreign Service Pension System (FSPS):

- ☐ I wish to leave my contributions in the retirement fund and apply to the:
Department of State
Office of Retirement (HR/RET)
Room H-620, SA-1
2401 E Street, NW
Washington, DC 20522

for a deferred annuity which will be payable at age 60 (age 62 if I am in FSPS). I understand that if I wish to withdraw my contributions at a later date I must submit an OF-138, Application for Refund of Retirement Contributions, directly to HR/RET.

NOTE: *The eligibility requirement for deferred annuity is five years of civilian service under the Foreign Service Retirement System.*

- ☐ I wish to apply for a refund of my retirement contributions. Attached is a completed OF-138 marked "A", Application for Refund of Retirement Contributions.

NOTE: *If you receive a refund of FSRDS retirement contributions, should you subsequently retire from government service, the amount of the refund plus interest will have to be repaid in order for the service to be used in your annuity computation. If you receive a refund of FSPS retirement contributions after the effective date of your resignation or after you transfer to FERS, you can never redeposit these funds. The period covered by the refund will not be creditable for the purposes of entitlement or computation of your annuity.*

Section 815 of the Foreign Service Act allows a Foreign Service employee, covered under the Foreign Service Retirement and Disability System (FSRDS),

to receive a payment of the retirement contributions provided the employee has been separated for 31 days and not re-employed in a position in the Foreign Service. Thus, an employee in FSRDS who transfers to a position in the Civil Service under the Civil Service Retirement System (CSRS) is eligible to receive the refund of retirement contributions.

Under the law, however, a different set of rules governs when an employee under the Foreign Service Pension System (FSPS) transfers to a Civil Service position under the Federal Employees Retirement System (FERS). In that instance, Section 815, provides that the lump sum benefit is payable under the same rules which govern payment of lump sum benefits under FERS. The FERS rules prohibit payment of the benefit when the person is re-employed in any Federal retirement system.

☐ I wish to transfer my contributions to the:

☐ Civil Service Retirement Fund

☐ Federal Employee Retirement Fund

NOTE: *If you become a participant in either one of the above listed systems, you can request that your monies in our Fund be transferred to CSRS or FERS. If you elect this option, complete the OF-138 marked "B" and the front side of the SF-2803, Application to Make Deposit or Redeposit, if CSRS, and SF-3108, Application to Make Service Credit Payments, if FERS. Request that your Personnel agency completes the back of the form and you personally send both forms back to this office.*

Address to send forms: *U.S. Department of State
Office of Retirement
2401 E Street, NW
H-620, SA-1
Washington, DC 20522*

☐ I am not eligible for deferred annuity, but I elect to leave my contributions in the FSPS Fund at this time to protect my service credit in the event of future Federal employment.

NOTE: *If you are in possession of your State Department Identification Card and Diplomatic Passports, they must be turned in to either your Executive Office, or the Office of Retirement in SA-1, Room H-620. If applicable, an OF-109, Separation Statement, and a DS-1707, Leave, Travel and Consultation Status form, must be submitted.*

☐ For employees enrolled under the Federal Employees Health Benefits (FEHB) and FEGLI programs, Please see Resignation / Separation and TCC Packages in the Forms area of <http://www.Rnet.state.gov> for information regarding Temporary Continuation of Coverage (TCC) of FEHB for up to an additional 18 months after separation and information about FEGLI.

☐ Participants in the Thrift Savings Plan, please see TSP Package in the Forms area of <http://www.Rnet.state.gov> for information regarding withdrawal.

(Signature)

(Printed Name)

(Date)

(SSN)

FOR OFFICE USE ONLY

I have given/sent the resignation checklist to the employee.

(Federal Retirement Benefits Specialist)

(Date)